NAVAL SUPPLY SYSTEMS COMMAND

Personnel Security Tracking On-Line (PRESTO!)

PRESTO!
User Manual

Draft Lotus Notes Version 1.0

PRESTO! User Manual

Naval Supply Systems Command

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Welcome to **PRESTO!**

PRESTO! provides Internet enabled, paperless processing and online viewing of Personnel Security information and key security clearance data for all Naval Supply Systems Command (NAVSUP) claimancy personnel. **PRESTO!** completely automates the management of Personnel Security information, accelerating processing to overcome time delays for clearance approval, Personnel Security data access, visit request processing, and clearance request status tracking. In addition, **PRESTO!** minimizes the staffing required for processing and managing Personnel Security data.

Personnel Security for the NAVSUP Claimancy is a regionalized function. The Fleet Industrial Supply Centers (FISCs) and Naval Inventory Control Point-Mechanicsburg (NAVICP-M) perform regional Personnel Security management. In **PRESTO!** the Regional Security Manager initiates Personnel Security transactions online. NAVSUP reviews and processes the transactions and electronically forwards the transaction to the Department of the Navy Central Adjudication Facility (DONCAF) for judgment. The **PRESTO!** database also allows for electronic transmission of visit requests and online inquiry for security clearance information.

This Users Manual covers the use of **PRESTO!** for processing personnel security information within the NAVSUP claimancy and where NAVSUP activities provide personnel security clearance support services. This manual describes NAVSUP and Field Activity Personnel Security roles and responsibilities in **PRESTO!** Each chapter is designed to address the activities performed by either the Field and/or Headquarters. Specifically, Chapter 1 introduces the history, purpose, and configuration of the **PRESTO!** application. Chapter 2 helps **PRESTO!** users log on to Lotus Notes® and explore the application. Chapter 3 guides users though the "How-Tos" of performing Personnel Security procedures in **PRESTO!** Chapter 4 features the Headquarters personnel roles in the security process. Finally, Chapter 5 provides the "Hows" and "Whys" of using **PRESTO!**'s electronic Reference Library available via the World Wide Web (WWW).

For additional information or questions on the **PRESTO!** application, please contact the QUADS Help Desk at (800) 362-8237 or (703) 277-6788.

Background

The **PRESTO!** concept was based on creating and maintaining an online Master Security Record (MSR). The MSR captures personal security information (currently referenced from paper file folders) for each person requiring a Personnel Security record. The MSR drives the generation of Personnel Security-related forms (initially the OPNAV Form 413) required to meet day-to-day business requirements. For instance, once the system generates a 413, the system tracks this form through the entire workflow process from the beginning to completion. Specifically, queues have been built into the system to prompt action from the responsible person(s) as the form moves through the process. Automated fax submissions to the Department of the Navy Central Adjudication Facility (DONCAF) occur when appropriate. System notifications occur at appropriately timed instances to remind and ensure time sensitive actions occur within documented policy timelines. Conditional clearances, overdue clearances, and Letter of Intent delivery dates are tracked and documented.

PRESTO! fosters a collaborative approach between the FISCs, NAVSUP, and DONCAF for preparation, processing, and completion of the Personnel Security business process.

Purpose

PRESTO! gives NAVSUP Field Activity security personnel the capability to electronically view and access Personnel Security information directly from their desktop when they need it. In most instances, the paper records are maintained off-site limiting access and creating unnecessary time delays. Accessibility to this information is key to performing Personnel Security related business. This access is controlled and limited to secure user identification lists and passwords.

PRESTO! solves the problems associated with a paper driven process, by enabling Field Activity Security personnel to submit a personnel action electronically to NAVSUP Headquarters for final processing and electronic submission to DONCAF. Time delays associated with information requests and distribution (i.e., US mail or e-mail) are significantly reduced. Personnel records are accessible, and the information can easily be retrieved.

PRESTO! offers managers the ability to expand and manage Personnel Security information with specialized reports and statistical information not easily calculated in the past, but required for staffing justifications and workload leveling**.**

System Configuration

PRESTO! is constructed in Microsoft Windows®-based Lotus Notes®. **PRESTO!** is designed to work in a standard Personal Computer (PC) environment. The minimum system requirements for **PRESTO!** installation are organized by hardware and software requirements.

Hardware Requirements

- ❏ 486/33+ IBM-Compatible Personal Computer (Pentium preferred)
- ❏ 3.5" Floppy Disk Drive
- ❏ Dedicated 14.4+ Modem (28/8 preferred)
- ❏ Analog Phone Line or Internet Connection

Software Requirements

- ❏ 8+ MB RAM (16 MB preferred)
- ❏ 60-70 MB Hard Disk Space
- ❏ 1 MB Video RAM
- ❏ Windows® 3.1 (Windows® 95 preferred)
- ❏ Lotus Notes® Client or Internet Browser
- ❏ Adobe Acrobat Exchange

Setting Up the Desktop

Lotus Notes® Connectivity

The minimum Lotus Notes® configuration and a Notes secure User ID are required. If you need help, contact your Lotus Notes® Systems Administrator.

Required Notes Setup File

In the Lotus Notes® directory 'Notes' (located in your assigned hard drive directory, usually c:\), a subdirectory titled "notes\data" should have been created during installation. The local database replica, *PRESTO.nsf* is stored in this subdirectory. If this is not the case, call the QUADS Help Desk at (800) 362-8237 or (703) 277-6788. **PRESTO!** will not properly update without these files in their correct location.

Communications with the Shared Lotus Notes® Application

Replication to or from the shared publication server may be accomplished on demand or scheduled uniquely for each site to provide timely updates to each user through an Internet or modem connection.

Server Numbers/IP Address

These numbers/address will be incorporated into various publication server connection documents at installation time. However, should it become necessary to re-configure Lotus Notes® due to local software changes, these numbers will be needed.

- ❑ **(717) 605-8207 or 8208** for Modem Access
- ❑ **204.222.238.17**
  Internet Address (TCP/IP Connection only)

Adding the **PRESTO!** Icon

If a **PRESTO!** icon was not added to your Lotus Notes® desktop when the application was installed, a connection document must be added to your personal name and address book. Please see your Systems Administrator for assistance.

Once the **PRESTO!** icon has been added to Lotus Notes® Workspace, you are ready to begin working with **PRESTO!**.

Adobe Acrobat Exchange V3.0/Reader V3.0

Adobe Acrobat Exchange is required at all **PRESTO!** sites to allow for the creation of Portable Document Format (PDF) documents. PDF is the de facto standard for electronic document distribution, because it is the easiest way to mirror the look and feel (i.e., format attributes) of an original.print copy **PRESTO!** provides Field Activities the capability to create and maintain online personnel folders. Acrobat Exchange offers the Activities a way to distribute this information to non-**PRESTO!** users (e.g., individuals leaving the Claimancy). Once the personnel folders are converted to PDF (see *Electronic Portable Document Format* for more details), the data can be placed in the **PRESTO!** Archive Database for archival purposes (see Chapter 5, *Using the Archive Database*).

PDF files are compact, cross platforms and can be viewed by anyone with the *free* Adobe Acrobat Reader (see your Systems Administrator to have Adobe Acrobat Reader installed on your desktop or simply obtain a copy of the reader at http://www.adobe.com.

Acrobat Exchange also provides the capability to take existing hardcopy personnel records, convert them to PDF and place them in the **PRESTO!** Archive Database (see *Procedures for PDF Conversion*, where applicable).

PRESTO! Support

Various support options are available to help users with functional and technical problems. Questions regarding **PRESTO!** installations, database access, replication (database upload/download), document navigation and the like should be addressed to the **QUADS Help Desk**.

Systems Help

Hours: M-F, 0700 - 1700 EST	Fax: (703) 277-1026
Phone: (800) 362-8237 or (703) 277-6788	E-Mail: quads@hq.caci.com

Functional Area Help

NAVSUP Security Sponsor

Name: Jacquie LaFata
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Chapter

2

Getting Started

Before working with **PRESTO!**, you should become familiar with Lotus Notes® terminology and navigation techniques. If you are unfamiliar with Lotus Notes® basics, refer to Appendix A for some very basic information about Lotus Notes®.

Double click the Lotus Notes® icon on your desktop. A Lotus Notes® 'Splash' screen appears while the system is initializing. The splash screen transitions to the Lotus Notes® workspace with labeled folder tabs across the top and database icons on the various tabs. A typical setup is shown in Figure 2.1.
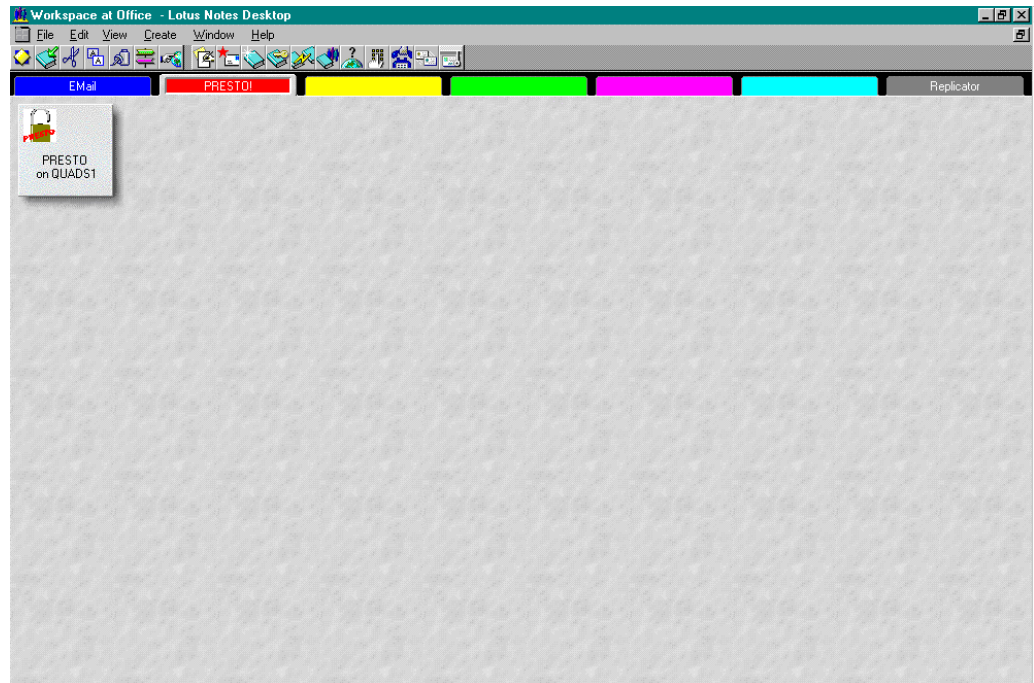
Figure 2.1 Lotus Notes® Workspace Page

Opening **PRESTO!**

From the Lotus Notes® desktop, double click the **PRESTO!** icon to launch the application. The **PRESTO!** Roadmap view appears as shown in Figure 2.2.

Figure 2.2 PRESTO! Roadmap View

Note:

If your horizontal scroll bar is missing or turned off in **PRESTO!**, select **View | Show | Horizontal Scroll Bar**. The scroll bar appears in all applicable views.

Exploring **PRESTO!**

All **PRESTO!** Personnel Security activities are performed from the **PRESTO!** Roadmap view as shown in Figure 2.2. The **PRESTO!** Roadmap view is broken out into three functional navigators: Inactive Queue, Claimancy Map, and Headquarters Action Queue. To access a functional navigator within **PRESTO!**, place the mouse pointer over the respective area. A red box highlights the topic and with a single mouse click, opens the applicable functional area.

Claimancy Map

Each of the FISC navigators (i.e., Norfolk, San Diego, Pearl Harbor) as shown in Figure 2.3, open to display the specific Personnel Security information views privy only to the appropriate FISC user. Each FISC navigator has six navigator options available: Folder Data, Drafts, Clearances Only, Suspense Queue, Impending Military Transfers, and Claimancy Clearances.
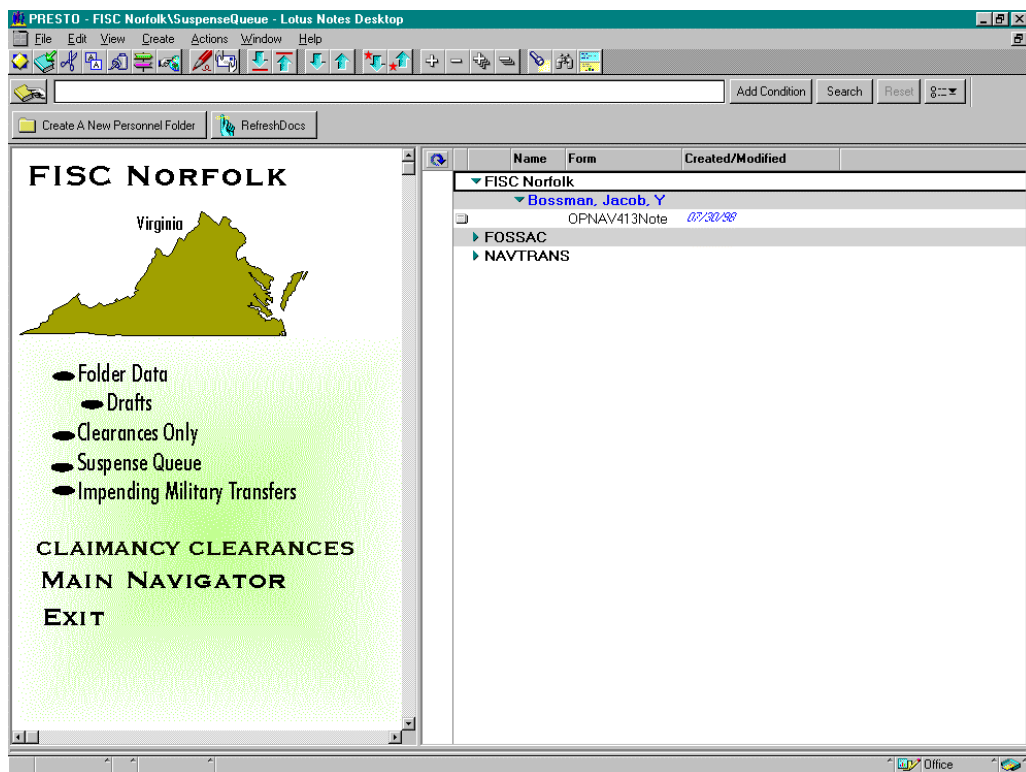
Figure 2.3 FISC Navigator

Folder Data

Select any FISC Navigator from the **PRESTO!** Roadmap. The Folder Data view is the default. This view displays a complete list of all personnel with security folders in **PRESTO!**. The list is organized alphabetically by sub-command. All folders contain a Master Security Record (MSR) that is correct and complete based on the requirements set forth by **PRESTO!**

Drafts

Select any FISC Navigator from the **PRESTO!** Roadmap. The Folder Data view is the default. Select the **Drafts** Navigator. The Drafts view displays, a list of all personnel with an incomplete MSR. This list is organized alphabetically by sub-command. Each folder contains a MSR that is not completed based on the requirements set forth by **PRESTO!** Field Activity pesonnel are responsible for completing the draft MSR.

Clearances Only

Select any FISC Navigator from the **PRESTO!** Roadmap. The Folder Data view is the default. Select the **Clearances Only** Navigator. The Clearances Only view displays a list of all Personnel Security folders in an abbreviated format. This list is organized alphabetically by sub-command.

Suspense Queue

Select any FISC Navigator from the **PRESTO!** Roadmap. The Folder Data view is the default. Select the **Suspense Queue** Navigator. The Suspense Queue view displays a list of all Personnel Security folders with action pending or taken against the respective folder. For example, 413s are sent to Headquarters for action and submission to DONCAF (i.e., the Detective symbol). The Suspense Queue also displays pending 413s and reflects when they have been forwarded to DONCAF (i.e., the newspaper symbol). (See *Detective*, *Newspaper*, and *Stop Sign* symbols for details.)

Impending Military Transfers

Select any FISC Navigator from the PRESTO! roadmap. The Folder Data view is the default. Select the **Impending Military Transfers** Navigator. Impending Military Transfers view displays a list of personnel scheduled for rotation out of the command within the next 30 days. This view provides the Personnel Security Manager an opportunity to ensure that transferring personnel checkout with security before they leave the command.

Claimancy Clearances

From any FISC view, select the **Claimancy Clearances** Navigator. The NAVSUP Claimancy view appears as shown in Figure 2.4.
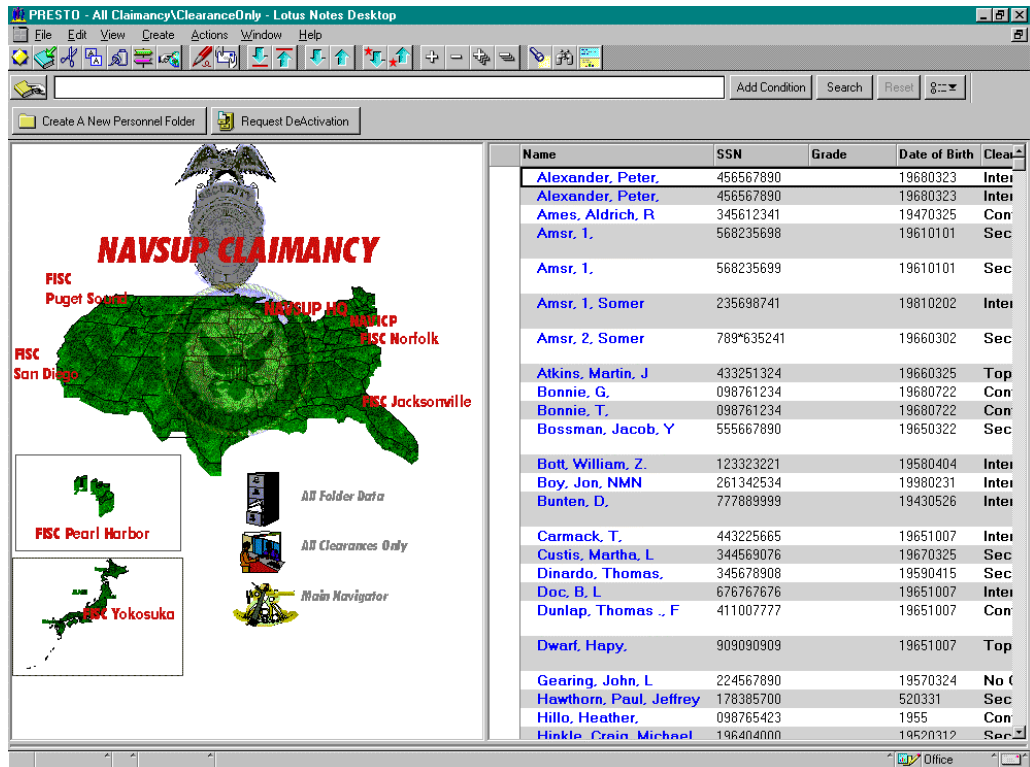
Figure 2.4 Claimancy View

The NAVSUP Claimancy view defaults to an abbreviated view of all NAVSUP Personnel Security folders. The abbreviated view shows only the information related to a person's clearance. This information could be used for Command Visit requests. The user can view this information for the entire Claimancy or by a given FISC.

There are several navigators available from this view: All Folder Data, All Clearances Only, and the individual FISC navigators (i.e., NAVSUP HQ, NAVICP, FISC Norfolk, FISC Jacksonville, FISC Pearl Harbor, FISC Yokosuka, FISC San Diego, and FISC Pudget Sound).

ALL FOLDER DATA

The All Folder Data view as shown in Figure 2.5, displays the name of each individual within the Claimancy, the specific command the individual is assigned, and the date of the last time any activity was performed within the individual's record. To access the All Folder Data view, select the **All Folder Data** Navigator from the Claimancy view.
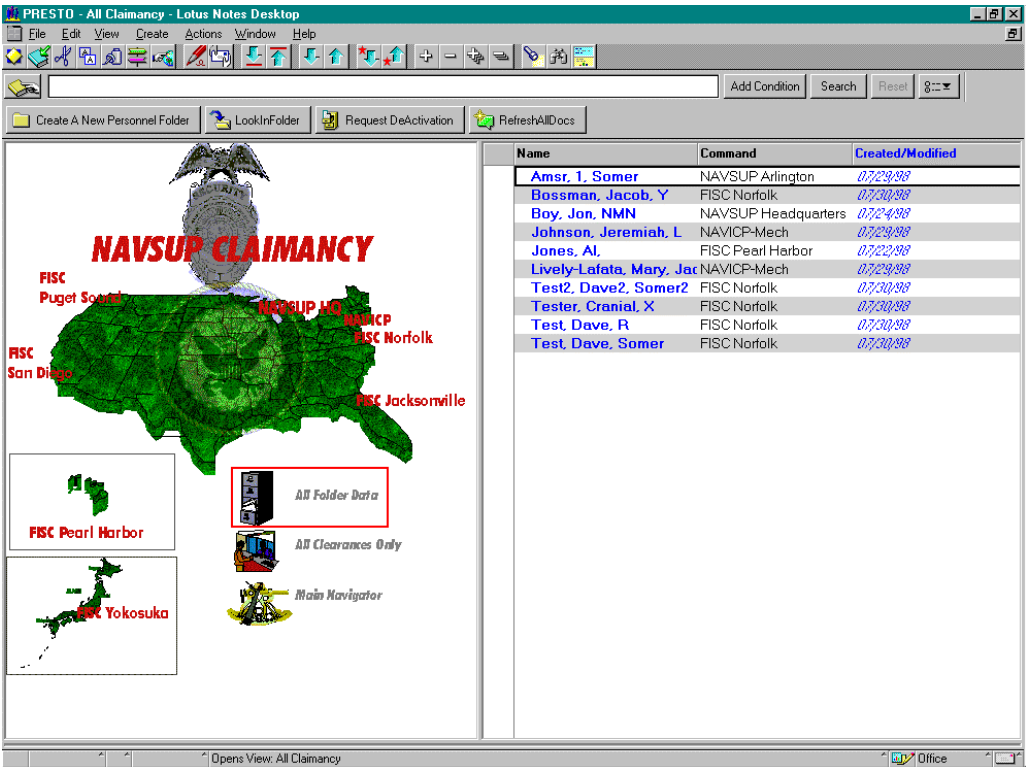
Figure 2.5 All Folder Data View

ALL CLEARANCES ONLY

The All Clearances Only view is the default view when entering the Claimancy view as shown in Figure 2.4. This view displays an abbreviated view of each individuals MSR to include the individual's name, social security number, and clearance level. To access the All Clearances Only view, select the **All Clearances Only** Navigator from the Claimancy view.

Headquarters Action Queue

The Headquarter Action Queue view provides information on the status, condition, or phase of a Personnel Security clearance.

This view displays five navigators: Pending Action Requests, Overdue Interim Clearances, Conditional Clearances, Letter of Intent (LOI) Tracking, and Inactive Queue, as shown in Figure 2.6. These Security Personnel queries are available only to NAVSUP Headquarters users. Each Action view directly or indirectly involves a required response, guidance, or direction from either DONCAF or the applicable Claimancy personnel.
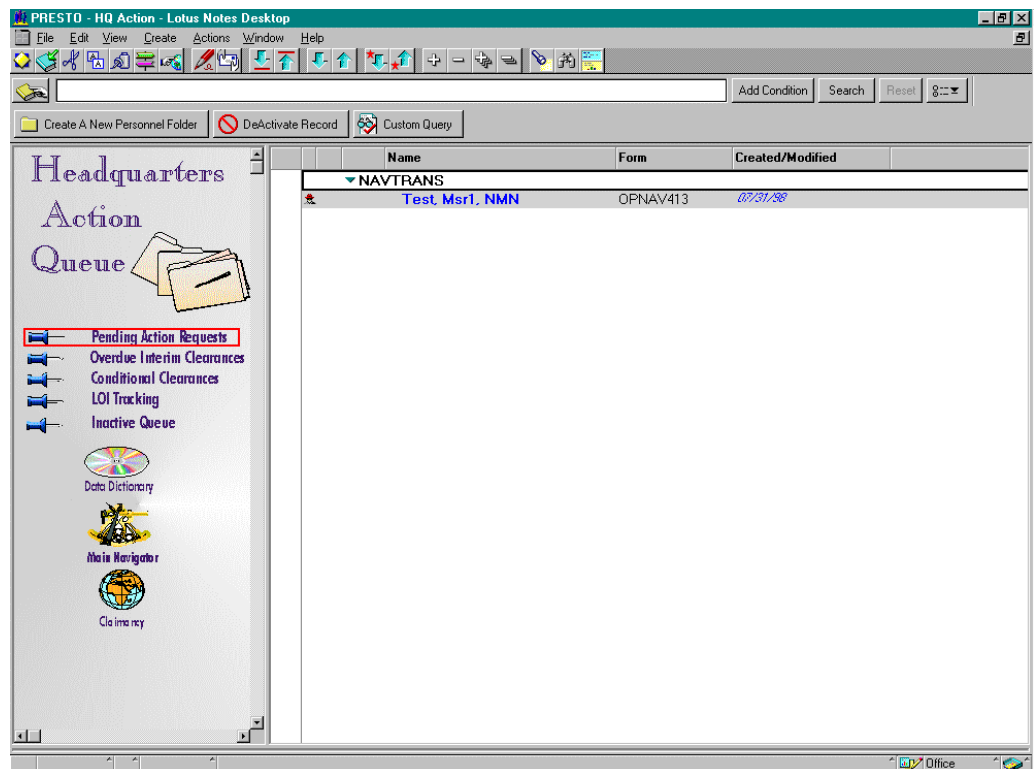
Figure 2.6 Headquarters Action Queue View

Pending Action Requests

The Pending Action Request view is the default view when entering the Headquarters Action Queue as shown in Figure 2.6. This view displays a list of pending Personnel Security information change requests for individuals within the Claimancy. Headquarters actions are denoted by a Detective symbol, a Newspaper symbol, or a Stop Sign symbol. To access the Pending Action Request view, select the **Pending Action Requests** Navigator from the Headquarters Action Queue view.

Overdue Interim Clearances

The Overdue Interim Clearances view as shown in Figure 2.7 displays a list of Interim Clearances that will expire in approximately one month. To access the Overdue Interim Clearances view, select the **Overdue Interim Clearances** Navigator from the Headquarters Action Queue view.
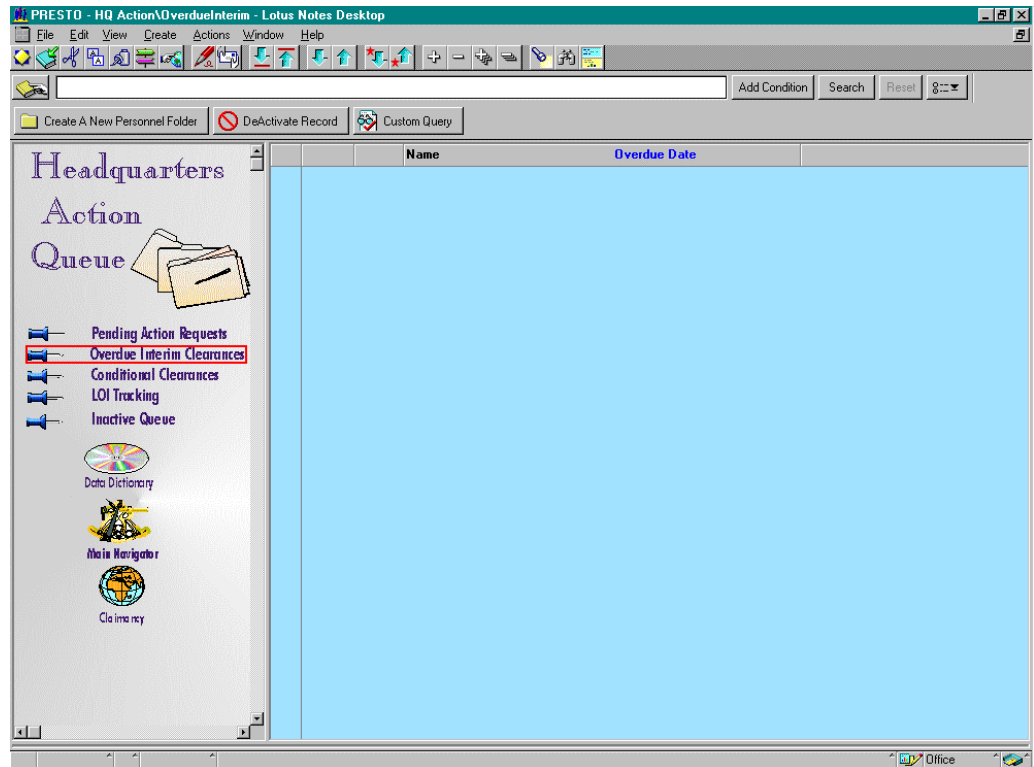
Figure 2.7 Overdue Interim Clearances View

Conditional Clearances

The Conditional Clearances view as shown in Figure 2.8 displays a list of clearances with conditional review and authorization periods placed upon them. Headquarters must prepare and conduct Conditional Clearance review periods monthly, quarterly, semiannually, or annually. To access the Conditional Clearances view, select the **Conditional Clearances** Navigator from the Headquarters Action Queue view.
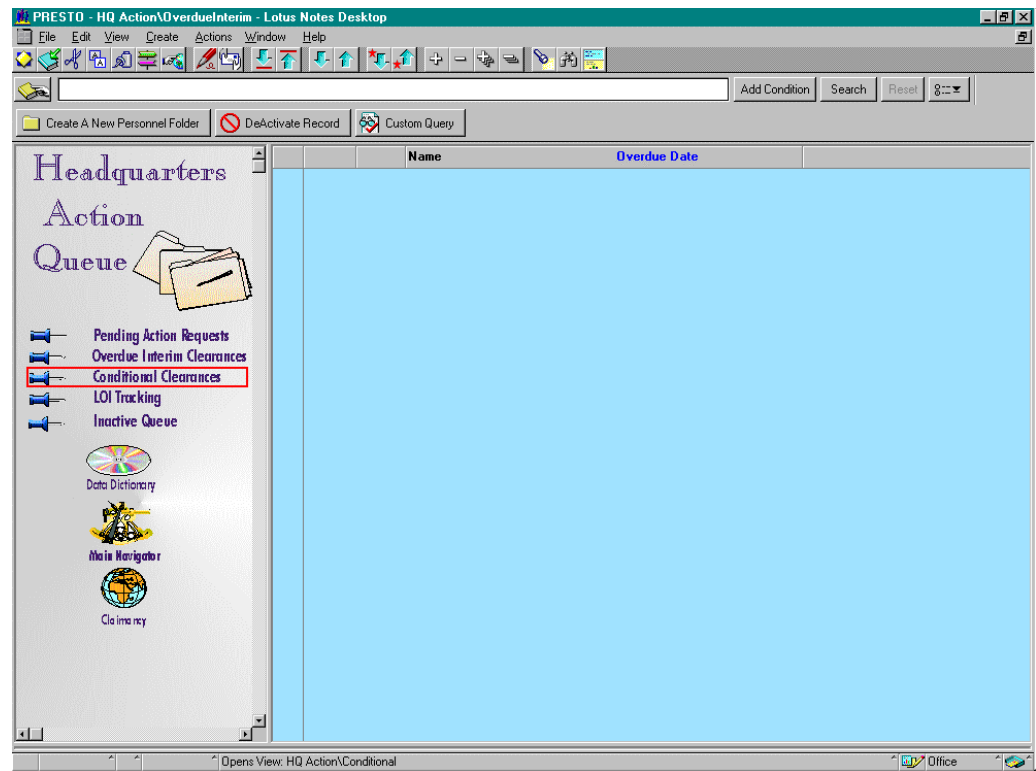
Figure 2.8 Conditional Clearances View

Letter of Intent (LOI) Tracking

The LOI Tracking view as shown in Figure 2.9 displays a list of individuals with a LOI against their Master Security Record. Headquarters tracks the lifecycle of an LOI from DONCAF request to LOI generation through final receipt. To access the LOI Tracking view, select the **LOI Tracking** Navigator from the Headquarters Action Queue view.
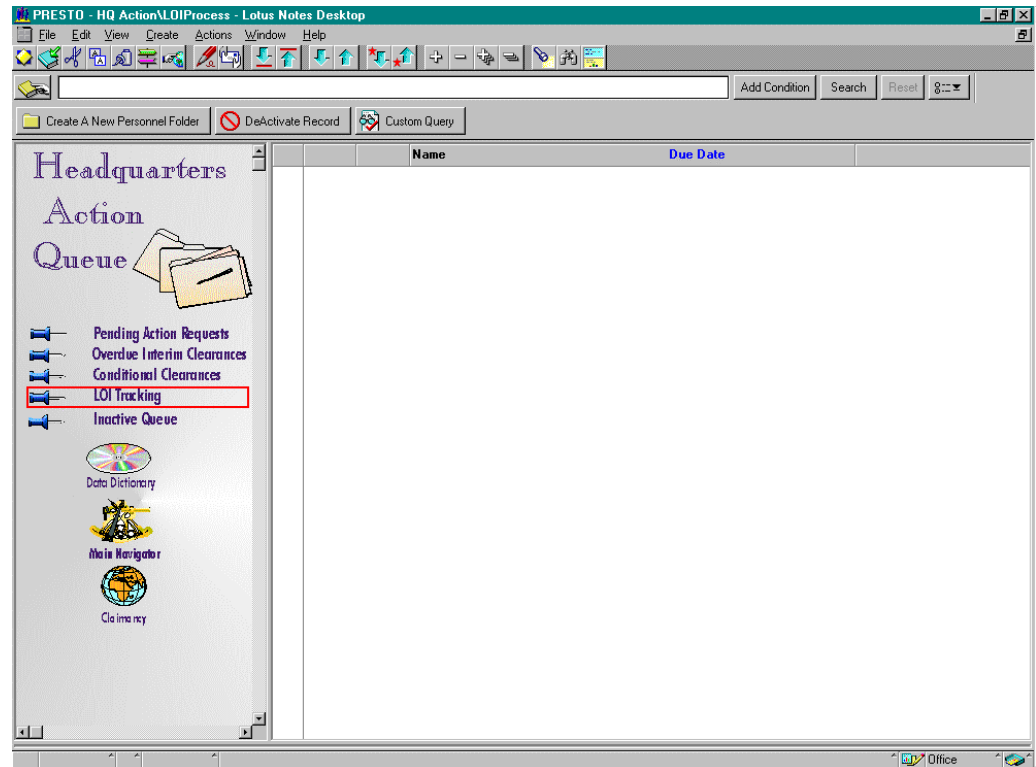
Figure 2.9 Letter of Intent View

Inactive Queue

The Inactive Queue view as shown in Figure 2.10 displays a list of Personnel Security records that have been de-activated or flagged for deactivation. The Inactive Queue informs Headquarters that specific individuals have left the Claimancy. Headquarters must verify the request is accurate and archive the record to the PRESTO! Archive. To access the Inactive Queue view, select the **Inactive Queue** Navigator from the Headquarters Action Queue view, or select the **Inactive Queue** Navigator from the PRESTO! Roadmap.
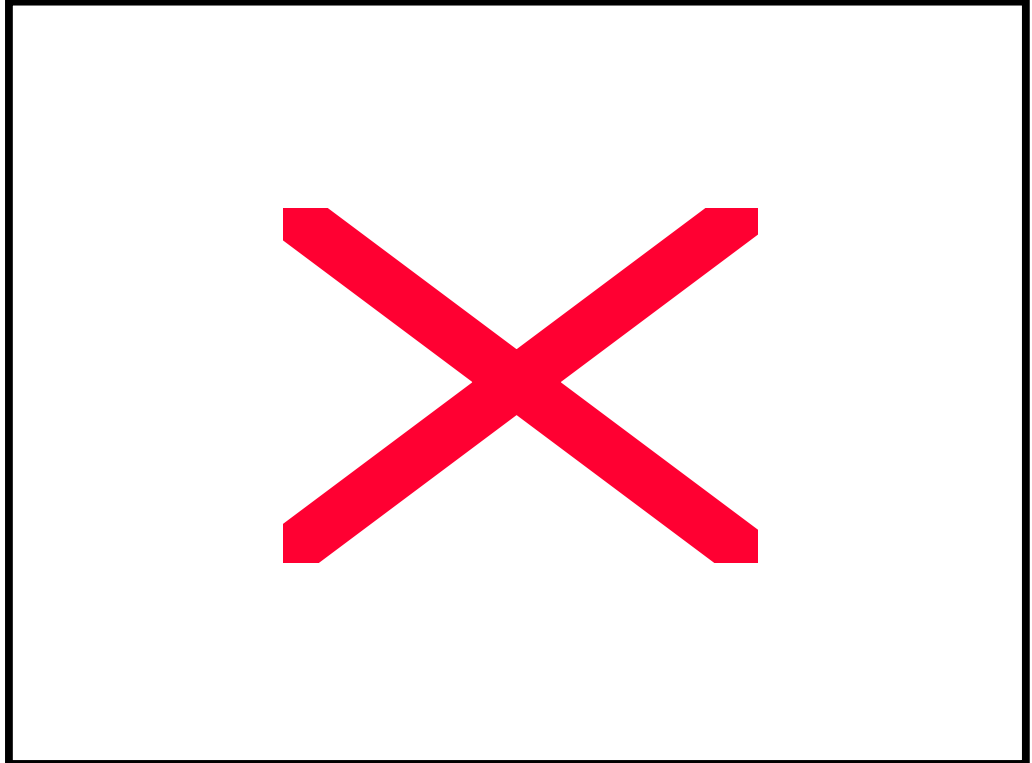
Figure 2.10 Inactive Queue View

Chapter

3

Using **PRESTO!**

A Master Security Record (MSR) is the current Personnel Security record of an individual within the NAVSUP Claimancy. A MSR contains an individual's Military/Civil Service Data (e.g., Name, SSN, Grade), their Organization Data (e.g., Command, UIC of FISC), and Citizenship Data (e.g., Birthplace, Verification). The MSR also contains Clearance and Security Data (e.g., Level, Date Granted), applicable SCI Additional Eligibility Information (e.g., Citizenship of Spouse, Parents), and Command Action information (e.g., Suspension of Cause, Letter of Intent).

MSRs are maintained as part of an online Personnel Folder. A Personnel Folder is created when an individual enters the Claimancy. Within PRESTO!, Personnel Folders can contain a complete MSR, OPNAV Form 413(s), a Short Record (i.e., Abbreviated Clearance Data), and DONCAF Adjudication Notification(s).

Viewing a Master Record

To view a MSR, select the appropriate FISC Navigator from the PRESTO! Roadmap. The view defaults to all Folder Data for the FISC. Double click the individual's name to review the record contents.

Viewing a Draft Record

Draft Master Security Records (DMSRs) will be created for each individual as PRESTO! comes online at a given FISC. These draft records will be populated with data obtained from the Personnel Security database maintained at NAVSUP Headquarters and DONCAF.

DMSRs can also be created when a complete history of an individual is not available at the time a MSR is generated or populated in PRESTO! Another situation where a DMSR can be created, is when insufficient time was available to input the data required to save a MSR.

To view a DMSR, select the appropriate FISC view and select the **Drafts** Navigator. Double click the applicable individual's name to open and view the draft record. To update the DMSR to an official **PRESTO!** Master Security Record, see *Editing Master Records* for details.

Creating and Saving a Master Record

To generate a new MSR, select the appropriate FISC Navigator from the **PRESTO!** Roadmap. From the FISC view, select the [**Create a New Personnel Folder**] button. A blank MSR opens and the screen shown in Figure 3.1 displays.

Figure 3.1 Master Security Record View

An MSR is generated when *ALL* information fields on the form are completed. Once all the fields have been populated with the correct information, select [**SaveChanges/New Record**] to save the MSR. If all required information is not known or has not been entered into the MSR, select [**Save Draft**]. **PRESTO!** will save the MSR to draft pending completion of all mandatory fields (see *Creating/Saving a Draft Record*).

Editing Master Records

Personnel Status and Information changes, such as a change in name or security clearance, may require modification from time to time. **PRESTO!** provides two ways to edit or change a MSR. The first option is to open a MSR. Select [**Edit**]. Scroll to the applicable field(s) and type the change(s). The second option to change a MSR is through a series of "easy to use" buttons. These buttons enable a user to quickly and efficiently change a MSR. The buttons are addressed in the following paragraphs.

Updating Organizational Data

From the Master Security Record, select [▶ **MORE**]. The MSR will display a series of Edit buttons. Select [**Enter Org data**]. The Organizational Data view displays in Edit mode. Make the necessary modifications to this section and select [**OK]**. The changes will display in the MSR.

Updating Citizenship Information

From the Master Security Record, select [▶ **MORE**]. The MSR will display a series of Edit buttons. Select [**Citizenship Info**]. The Citizenship Data view displays in Edit mode. Make the necessary modifications to this section and select [**OK**]. These changes will display in the MSR.

Updating Security Data

From the Master Security Record, select [▶ **MORE**]. The MSR will display a series of Edit buttons. Select [**Security data**]. The Clearance Data view displays in Edit mode. Make the necessary modifications to this section and select [**OK**]. These changes will display in the MSR.

Updating Command Actions

From the Master Security Record, select [▶ **MORE]**. The MSR will display a series of Edit buttons. Select [**Command Actions**]. The Command Actions view displays in Edit mode. Make the necessary modifications to this section and select [**OK**]. These changes will display in the MSR.

Attaching "Other" Forms

From the Master Security Record, select [▶ **MORE]**. The MSR will display a series of Edit buttons. Select [**Attach "Other" Forms**]. The Miscellaneous Personnel Information view displays in Edit mode. Select [**Attach Files**] to append additional supporting documentation to an individual's personnel folder. A Create Attachment(s) window displays. Locate the correct file from the proper drive and directory. Select [**Create**]. Repeat this process until all applicable files are appended to the personnel folder. Select **File | Save** to save the updates to the folder. Select **File | Close** to view these changes in the MSR.

Creating and Saving a Draft Record

A DMSR is created when a complete history of an individual is not available at the time a Master Security Record is created. However, specific information fields on the form must be identified to save a DMSR. The following fields must be populated to successfully create a DMSR:

Military/Civil Service Data

Field	Notes
Name	None
Social Security Number	Type *NNNNNNNNN*
Special ID	System Generated
Status	None (If Military – Enter Military Service Code)
Birth Date	Type *YYYYMMDD*
Grade (Military/Civil Service)	None

Organization Data

Field	Notes
Command Code	None
UIC of FISC	System Generated
Estimated Departure Date (*Military Personnel Only*)	None

Once all mandatory fields have been populated with the correct information, select [**Save Draft**].

Creating a Record Copy

At some point, an individual will leave the Field Activity. When this situation occurs, **PRESTO!** provides the capability to copy a person's security folder to soft or hard copy. This way the individual can take the information with them or the Security Manager can forward the information to the appropriate Point of Contact (POC) at the individual's new Command.

Electronic Portable Document Format (PDF)

To create a soft copy of a person's MSR or form, select the appropriate FISC Navigator from the **PRESTO!** Roadmap. Select the **Folder Data** Navigator. Open the applicable personnel record and select [**Print**]. Select the Acrobat PDF Writer driver and select [**OK**]. Verify the Printer parameters (e.g., pages) are correct and select [**OK**]. Identify the

appropriate storage area (e.g., drive, directory), type in a name for the file and select [**OK**]. The output will be sent to a PDF file that can be reviewed in *Adobe's Acrobat Reader* or *Acrobat Exchange*.

Hard Copy

To create a hard copy of a person's MSR, select the appropriate FISC Navigator from the **PRESTO!** Roadmap. Select the **Folder Data** Navigator. Open the applicable personnel record, and select **File | Print**. Ensure the printer and print parameters are correct and select [**OK**].

Requesting Record Deactivation

In situations where an individual is leaving the Activity or Claimancy, the Field no longer maintains their electronic folder. **PRESTO!** provides the functionality to electronically deactivate a Personnel Security folder and transfer it to Headquarters for archival.

From the appropriate FISC view, highlight the applicable personnel record, and select [**Request DeActivation**].

Select **<F9>** or select the blue circular arrow located in the upper left corner of the personnel folder, to refresh the view. The Personnel Security record selected for deactivation no longer appears in the FISC **Folder Data** view. The record now resides in the **PRESTO!** Inactive Queue for Headquarters personnel action.

Generating and Attaching Forms

PRESTO! is designed to generate online Personnel Security forms. Specifically, the OPNAV Form 5510/413 is generated as a result of the creation or modification of a Master Security Record (MSR). This form is only the first of several forms that will become part of **PRESTO!**'s online services.

Other forms such as the Standard Form (SF) 85 and (SF) 86 are electronically generated using the Electronic Personnel Security Questionnaire (EPSQ) software. EPSQ is a software package designed to eliminate rejection of investigation requests because they are incomplete or inaccurate. When all mandatory data is provided to EPSQ in the appropriate format, EPSQ will generate the different questionnaires (i.e., SF 85 or SF 86) for various positions. SF 85s and SF 86s can then be attached to a Form 413 in **PRESTO!**

OPNAV Form 5510/413

An OPNAV Form 413, as shown in Figure 3.2, is a Personnel Security Action Request that automatically generates when a Field Activity completes and saves a new MSR, or when certain information fields are changed within the MSR.

Figure 3.2 OPNAV Form 413 View

Key changes to Personnel Security information require the submission of an OPNAV 413 to NAVSUP Headquarter. Headquarters processes and submits all 413s to the Department of the Navy Central Adjudication Facility (DONCAF).

PRESTO! tracks the 413 process by notifying NAVSUP Headquarters that a 413 has been submitted for change and requires review and approval. Headquarters approving officials electronically sign and forward the Personnel Security information change request to DONCAF. At the same time the 413 is submitted to DONCAF, **PRESTO!** provides the originator of the request with an email message indicating the 413 was processed and sent directly to DONCAF.

Creating an OPNAV Form 5510/413

The Field Activity is responsible for maintaining the accuracy of a Personnel Security record. **PRESTO!** aides in this process by *automatically* generating a 413 when a new MSR is created or when one of the following fields is changed in an existing MSR (see *Changing a 413* for more details):

- ❑ Paygrade
- ❑ Command
- ❑ Clearance
- ❑ Position Sensitivity
- ❑ Conditional Clearance
- ❑ Suspension for Cause
- ❑ Letter of Intent

When a 413 is not automatically created, **PRESTO!** allows a user to manually request its creation. To create a 413, open the MSR and select [**Create OPNAV413**].

Changing a 413

Once a 413 has been created, additional information may be added before it is forwarded to Headquarters. When **PRESTO!** generates a 413, the application defaults to Edit mode. There are 14 fields that can accept comments or notes to clarify the request. Field Activities have the capability of enhancing 413s prior to transferring them to Headquarters. Applicable field changes may be performed on the type of Clearance Request, Request for Determination, providing Remarks or adding Notes reflecting any enclosures, and simply attaching Standard Forms (SF) such as SF 85 or SF 86 (see *Attaching Files*). Headquarters applies a signature to the 413 when it is approved for submission to DONCAF.

Attaching Files

PRESTO! is compliant with Electronic Personnel Security Questionnaire (EPSQ) forms, specifically, Standard Forms (SF) SF 85 or SF 86. See *Generating and Attaching Forms* for more details on EPSQ.

To attach a file to a 413, select [**Attach Investigation Files**], located at the bottom of the form. A Create Attachment(s) window displays as shown in Figure 3.3. Locate the correct Portable Document Format (PDF) file from the proper drive and directory. Select [**Create**]. A PDF SF85 or SF86 file icon attaches to the 413.
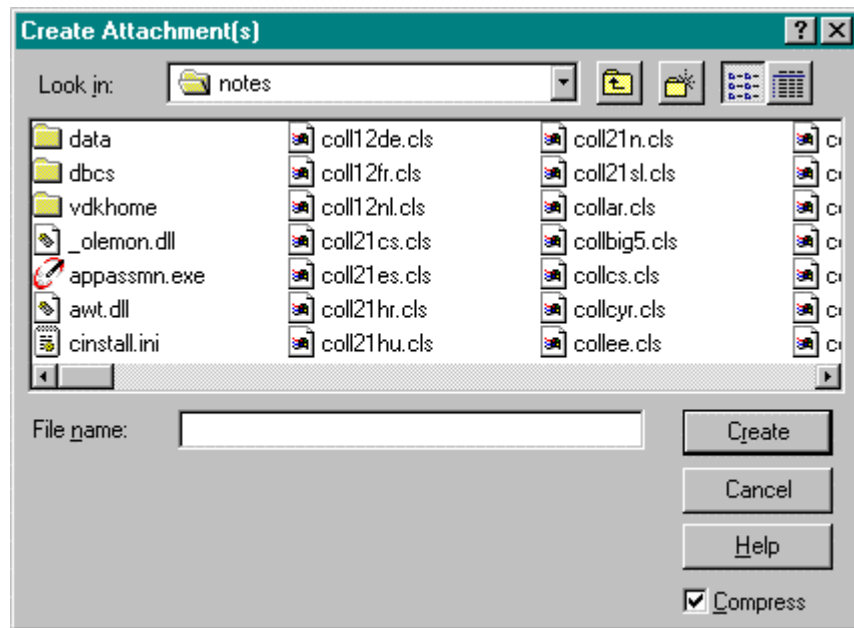
Figure 3.3 Create Attachment(s) Browser

Saving the 413

Once a 413 has been generated and/or modified, select [**Command Approval**]. The 413 is saved and sent directly to the Headquarters Action Queue. The Field Activity can see this pending 413 from two different views: the Suspense Queue and the MSR view folder option [**View Folder**].

The **PRESTO!** Advantage

PRESTO! offers electronic access to NAVSUP security information from an individual's desktop. Accessibility to this information is key to performing Personnel Security related business. The **PRESTO!** advantage is specialized views that enhance and expedite the security process while improving information dissemination and process management tracking. **PRESTO!** organizes important information into carefully constructed snapshot views:

❑ Abbreviated Records

❑ Online Personnel Folders

❑ Suspense Queues

❑ Letter of Intent (LOI) Tracking

❑ The Archive Database

Abbreviated Records

The Abbreviated Records view is a clear and concise snapshot of an individual's current clearance information. **PRESTO!** organizes the Abbreviated Records view under two distinct navigators: Clearances Only and All Clearances Only.

If you are positioned at the **PRESTO!** Roadmap, select the appropriate Navigator for your command. Select the **Clearances Only** Navigator. The default is the Abbreviated Records view. Double click an individual's name and a snapshot of the individual's MSR displays, as shown in Figure 3.4.

Figure 3.4 Abbreviated Record View

If a user requires the Abbreviated Records view and is not currently positioned at the **PRESTO!** Roadmap view, select the **All Clearances Only** Navigator from the NAVSUP Claimancy view. This view displays the Abbreviated Records list. Double click an individual's name. A snapshot or an abbreviation of the individual's security folder displays, similar to that shown in Figure 3.4.

Online Personnel Folders

As a MSR and applicable documents are created, **PRESTO!** automatically consolidates the documents and displays them in an individual electronic folder. This process is similar to how paper security records are maintained today, with one big difference, the folder contents are managed online and automatically updated.

Looking at Folder Contents

Folder contents are tied to the MSR. To view the folder contents, from the **PRESTO!** Roadmap or from the appropriate FISC view, open an individual's MSR and select [**View Folder**]. A list of OPNAV 413s, the Short Record (i.e., the individual's Abbreviated Record), as well as OPNAV413 note(s) (i.e., granting/approving/disapproving security clearance requests) are available for review and/or modification.

To open a document within a folder, double click the document. Select **File | Close** to return to the View Folder view.

Suspense Queue

The **PRESTO!** Suspense Queue view provides Field Activities the opportunity to monitor the status of a 413: submission to Headquarters, Approval/Disapproval by Headquarters, and Headquarters submission to DONCAF.

Status of OPNAV Form 413s

There are three icons in **PRESTO!** that denote where a 413 stands in the approval process: the Detective Symbol, the Newspaper Symbol, and the Stop Sign Symbol. All three symbols are discussed in the following paragraphs.

DETECTIVE SYMBOL

A Detective Symbol denotes that action needs to be taken on the part of Headquarters to review, sign and submit the form (e.g., OPNAV 413s) to DONCAF.

From the Suspense Queue view, locate the individual with a Detective Symbol to the left of the record. Double click the icon to open and review the 413 awaiting submission to DONCAF.

A Newspaper Symbol denotes that Headquarters has reviewed, signed and submitted the form (e.g., OPNAV 413s) to DONCAF.

From the Suspense Queue view, locate the individual with a Newspaper Symbol to the left of the record. Double click the symbol to open and review the NAVSUP Transaction Notification, as shown in Figure 3.5.
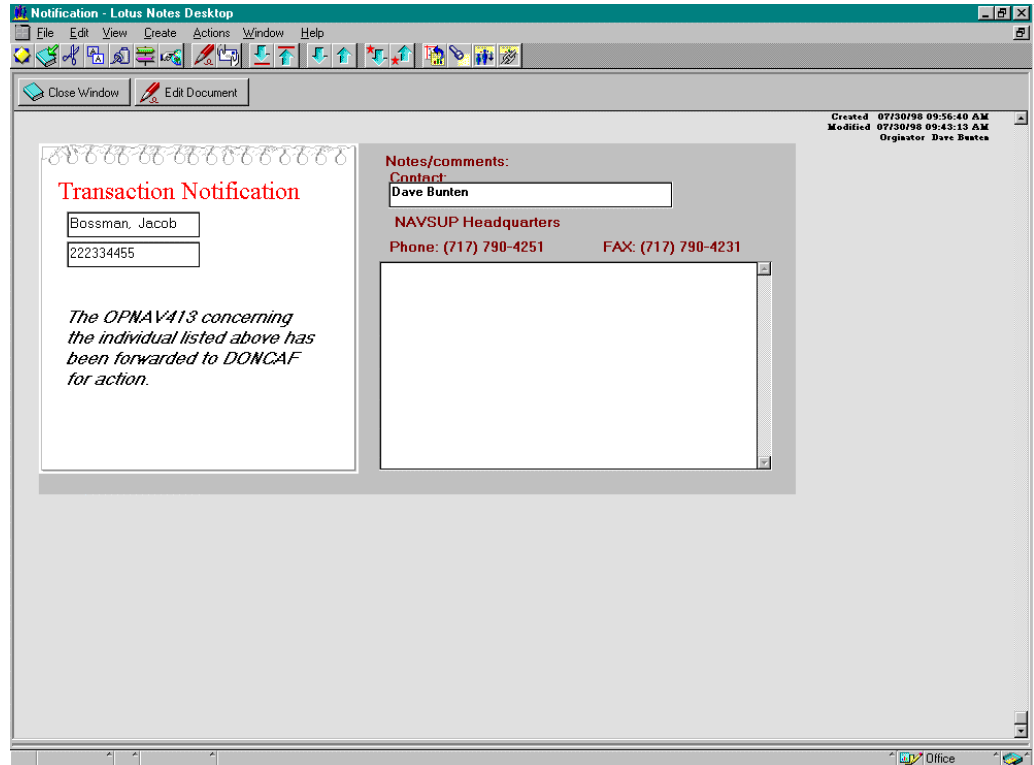
Figure 3.5 PRESTO! Transaction Notification

A Stop Sign Symbol denotes that Headquarters has reviewed and disapproved the submitted form (e.g., OPNAV 413s).

From the Suspense Queue view, locate the individual with a Stop Sign Symbol to the left of the record. Double click the symbol to open and review the unapproved 413.

Letter of Intent (LOI) Tracking

PRESTO! tracks Letters of Intent from request to delivery. When an individual conducts his or herself in an unethical manner, Headquarters receives a request from DONCAF informing them that a LOI is required of the individual in question. Headquarters enters the date they receive the DONCAF request in the MSR. Once the MSR is correctly dated, Headquarters forwards the DONCAF request to the Parent Command Security Manager. Headquarters updates the MSR once again with the current action and date.

Next, the Parent Command Security Manager hand carries the Request for a LOI to the individual. The Parent Command enters the date the MSR was delivered. Once the Request is delivered to the individual, a 30-day clock starts in **PRESTO!**. The individual must now comply with the request and generate a written response to the LOI within the next 30 days. If the individual defaults on the request within the 30 days, the LOI is considered outstanding and the renewal of the clearance will be denied. However, if the LOI is completed within the given timeframe, the Parent Command Letter of Intent date and the **PRESTO!** clock trigger will not prompt for further action.

To indicate the applicable status of the LOI (i.e., Initial Receipt, Delivered to Parent Command, Delivered to Employee, Response Completed) and enter the *Letter of Intent Date* with the date applicable to the corresponding action, select the appropriate FISC Navigator from the **PRESTO!** Roadmap. Select the individual's record from the FISC **Folder Data** view and open the MSR. Scroll to the Command Action section and enter the applicable information. When the information is entered correctly, select [**Save Changes/New Record**].

The Archive Database

NAVSUP Headquarters maintains Personnel Security records (i.e., paper) on all Claimancy personnel. Field Activities must call Headquarters personnel to obtain information from the personnel folder. Since these paper documents need to be more accessible and are often used for reference material, NAVSUP decided to make this information available online.

Paper Personnel Security records maintained by NAVSUP Headquarters were converted to Portable Document Format (PDF). See Chapter 1, *Adobe Acrobat Exchange V3.0/Reader V3.0*, for more details on PDF. To view Claimancy-wide Personnel Security folder information, launch your Internet Browser. Type the following address: http://www.quads.navsup.navy.mil. From this view, select [**Business Applications**]. Select **PRESTO!**. Select Archive Database. Enter your login and password.

Scanning to PDF

Refer to the following checklist for specific procedures in converting hardcopy to PDF, as well as accurately posting these documents to the appropriate Reference Library record.

- ❑ Order the pages to be scanned in the following sequence:
    - _ OPNAV Message
    - _ 413
    - _ 5520/20 front
    - _ 5520/20 back
    - _ Chronologically order, from newest to oldest, all other pages.
- ❑ Copy the back of all two sided documents and place them in the correct order to create a single-sided stack, or be prepared to make the appropriate adjustments during and after scanning.
- ❑ Place the page(s) "face up" in the scanner.
- ❑ Move the scanner lever to Position 3.
- ❑ Open Acrobat Exchange, select **File | Scan** from the menu bar.
- ❑ Select [**Configure**].
- ❑ Select [**Settings**]. Double-check the default settings. **Note**: Scanner Defaults should work for over 98% of the records to be scanned.)
- ❑ The Scanner Settings window should default to the settings displayed in Figure 3.6.
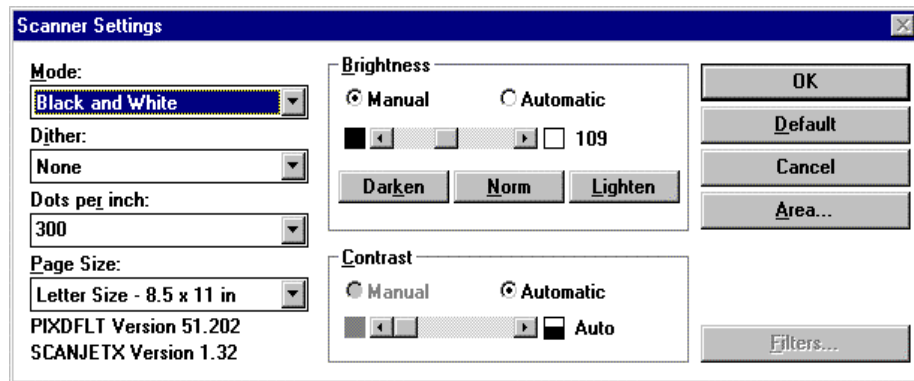
Figure 3.6 Scanner Settings Window

- _ If the Default settings are correct, select [**Cancel**] *twice* to return to the Adobe Acrobat Scan Window, as shown in Figure 3.7.

- _ If the Default settings are not correct, make adjustments and select [**OK**] *twice* to return to the Adobe Acrobat Scan Window.

❑ Select the appropriate Document Type (e.g., **Single-Sided Stack, Double-Sided Stack**) radio button, as appropriate.
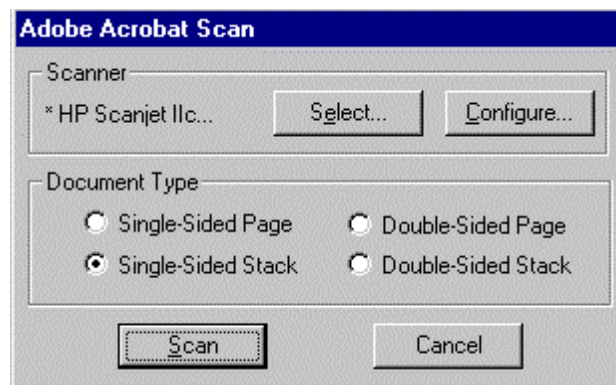
Figure 3.7 Adobe Acrobat Scan Window

❑ Select [**Scan**].

❑ When Acrobat Exchange has finished scanning, the following window, as shown in Figure 3.8 should appear.
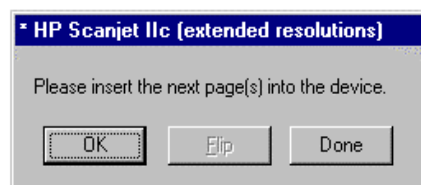
Figure 3.8 HP Scanjet IIc Window

- ❑ Select [**Done**].
- ❑ Select **File | Save As** from the menu bar.
  - _ Store the file in a pre-determined folder (e.g., c:\PRESTO).
  - _ Name the file appropriately with the extension *.PDF* (e.g., jones.pdf)
- ❑ Select [**Save**].
- ❑ Compare the paper page(s) to the PDF page(s):
  - _ Check for missing pages, make sure all the pages were captured and in the correct order.
  - _ Check for quality problems created by skewed input, specifically missing data around the pages' edges.
- ❑ If all pages are okay, then continue. If <u>not</u>, then:
  - _ Place the missing page(s) in the Document Feeder.
  - _ In Acrobat Exchange, go to the last page of the PDF and select **File | Scan** from the menu bar. This procedure will add the pages scanned to the end of the open PDF.
  - _ Reorder pages, if required, using the Acrobat Exchange thumbnail utility.
- ❑ Select **File | Save As** from the menu bar. Provide a logical filename and identify a storage path (e.g., c:**PRESTO!**\).
- ❑ Select **File | Close** from the menu bar to close the PDF.

Composing Archive Record Changes

Only Headquarters personnel can create or modify a Reference Library record and Master PDF archive reference file. After the initial Record Reconciliation effort, Field Activity personnel will need to *Compose a Change Request* to submit updates or changes to an existing Reference Library PDF.

From the Archive Database view, locate and open the applicable individual's library record. Detach the PDF file to your Working **PRESTO!** directory. Merge the PDF currently on file at your Field Activity, with the existing PDF (e.g., MT123456) and perform a "Save As" to the new PDF. WARNING!!! Ensure the new PDF is named the same file name as the existing PDF (e.g., MT123456). **PRESTO!** provides edit checks within the application that will only allow proper/corresponding file names to be attached to records in the Reference Library.

Return to the Reference Library view, locate and open the applicable individual's library record. From the Archive Record view, select [**Compose Record Change**]. From the Record Change view, type any applicable comments in the free form text field and select **File | Attach**. From the Create Attachment(s) window, locate your working **PRESTO!**

directory and the newly "Save As" PDF file. Select [**Create**] to reattach the revised PDF. Select **File | Save** to save the updates to the library record.

Chapter

4

NAVSUP Features

Chapter 4 is designed for and applicable only to NAVSUP Headquarters personnel. Most **PRESTO!** users will not be able to see the functions and views discussed in this Chapter. Only users with Headquarter defined roles and system administration privileges are able to perform and view the **PRESTO!** features discussed throughout this Chapter.

Primarily, NAVSUP Headquarters is responsible for adjudicating Personnel Security information changes within the Claimancy. For the purpose of **PRESTO!**, NAVSUP Headquarters has been defined as the approving authority for the Claimancy. When key changes to Personnel Security information require the submission of an OPNAV 413, Headquarters reviews, processes and submits 413s to the Department of the Navy Central Adjudication Facility (DONCAF). **PRESTO!** tracks this process through a series of navigators and views. Each navigator and corresponding views are addressed in the following paragraphs.

Headquarters Action Queue

When an OPNAV 413 reaches the Headquarters Action Queue, it now goes through a DONCAF pre-review and approval process. From the **PRESTO!** Roadmap, select the **Headquarter Action Queue** Navigator. The default view reflects a list of pending 413s submitted by Field Activities that are awaiting review and approval.

Pending Action Requests

Review a 413

The OPNAV 413 as shown in Figure 3.2 is reviewed by NAVSUP Headquarters for accuracy and completeness of the Personnel Security information changes for individuals within the Claimancy. Headquarters must review and approve the 413 and any attachments they submit to DONCAF.

When the OPNAV 413 is posted in **PRESTO!** for Headquarters review, the form will display a "Detective" symbol to the left of the individual's name. This symbol denotes action is required by Headquarters to process, sign and submit the form (e.g., OPNAV 413) to DONCAF.

From the Pending Action view, locate an individual's name with a Detective Symbol to the left of the record. Double click the symbol to open, review, and apply a signature to the 413.

To review attachments within the 413, double click the file to the right of the [**Attach Investigation Files**] button. A window will appear. Select [**View**]. The file you selected will display in the Lotus Notes Universal Viewer. After reviewing the material, select **File | Exit** to return to the **PRESTO!** Roadmap.

Edit a 413

From the Pending Action view, locate the individual's name with a Detective Symbol to the left of the record. Double click the symbol to open the record. Select [**Edit Record**]. At this time, the record may be modified (e.g., applying signatures, attaching additional files) to accurately reflect the information required to send the form to DONCAF. Once all changes have been made to the record, select [**Save Form**].

Approve/Disapprove 413

When a record has been reviewed, Headquarters needs to approve or disapprove the form. If the 413 is correct, select [**Edit Record**]. The 413 displays in Edit mode ready to apply a signature. Scroll to locate the signature block #28.

Select the Down Arrow button and select the appropriate Keyword. Select [**OK**]. The name and signature will display in block #28 and #29. Select [**HQ Approval**]. A Transaction Notification is generated for the applicable request and a Newspaper Symbol appears to the left of the personnel's master record in the FISC's Suspense Queue. A copy of the Transaction Notification is also forwarded via email to the submitting Security Representative as confirmation that the document has been processed and sent to DONCAF.

If the 413 is unacceptable, select [**HQ Disapproval**]. A Stop Sign Symbol appears to the left of the person's name in the FISC's Suspense Queue. The Stop Sign indicates Headquarters has reviewed

Forward to DONCAF

When Headquarters approves a 413, the 413 is automatically forwarded to DONCAF. **PRESTO!** uses a software "plug in" known as Lotus Fax that transparently faxes a copy of this record directly to DONCAF for adjudication.

DONCAF Confirmation on Security Clearances

DONCAF has six months to investigate and grant a security clearance. An Adjudication Message (i.e., a written response) approving or disapproving the authorization of a security clearance is emailed back to NAVSUP Headquarters once the investigation is complete and authorization is granted. An example of the message is shown in Figure 4.1. It is Headquarters responsibility to update the person's Master Security Record (MSR) and applicable supporting documentation.
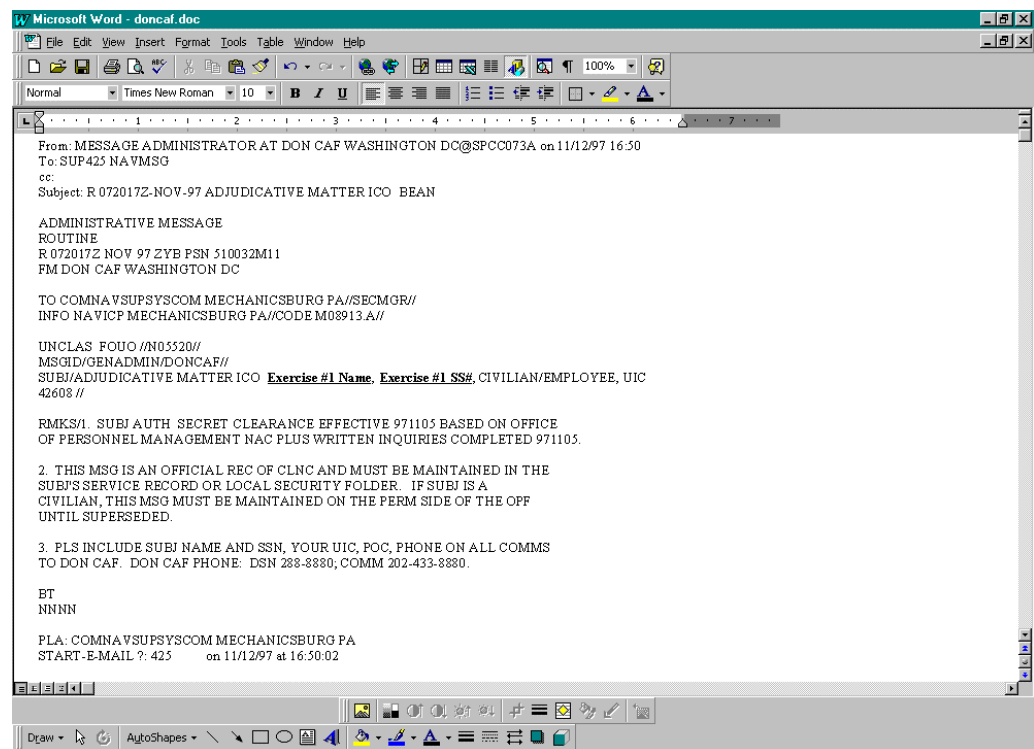
Figure 4.1 DONCAF Adjudication Message

To update a MSR, locate the individual within their applicable FISC. Open the MSR and select [**Adjudication Notification**]. A Transaction Notification displays, as shown in Figure 4.2 indicating that this Adjudication has been completed by DONCAF with the following results.

Figure 4.2 Transaction Notification

At this time, **PRESTO!** provides the opportunity to copy and paste the recently received DONCAF message, (Figure 4.2) into the free form text field to the right of the Transaction Notification. Copy and paste this information at this time. Select [**Save/Close**]. When the notification message has been saved, it is sent to the appropriate requestor and added to the Suspense Queue view and the MSR view folder option [**View Folder**]. From the MSR, select [**Save/Close**]. The Adjudication Notification (i.e., OPNAVNote) is appended to the individual's online folder.

Overdue Interim Clearances

A clearance that is submitted to DONCAF has exactly six months before it expires. In five months, **PRESTO!** triggers the Overdue Interim Clearance queue. Headquarters routinely reviews the queue and sends out a "tracer" on the interim clearance pending DONCAF review.

From the Headquarters Action Queue view, select the **Overdue Interim Clearances** Navigator, as shown in Figure 4.3. A list of Interim clearances, (denoted by a Detective Symbol) display. This view displays existing 413s that were submitted to DONCAF approximately five months ago. NAVSUP must now notify DONCAF that the pending 413 is about to expire.
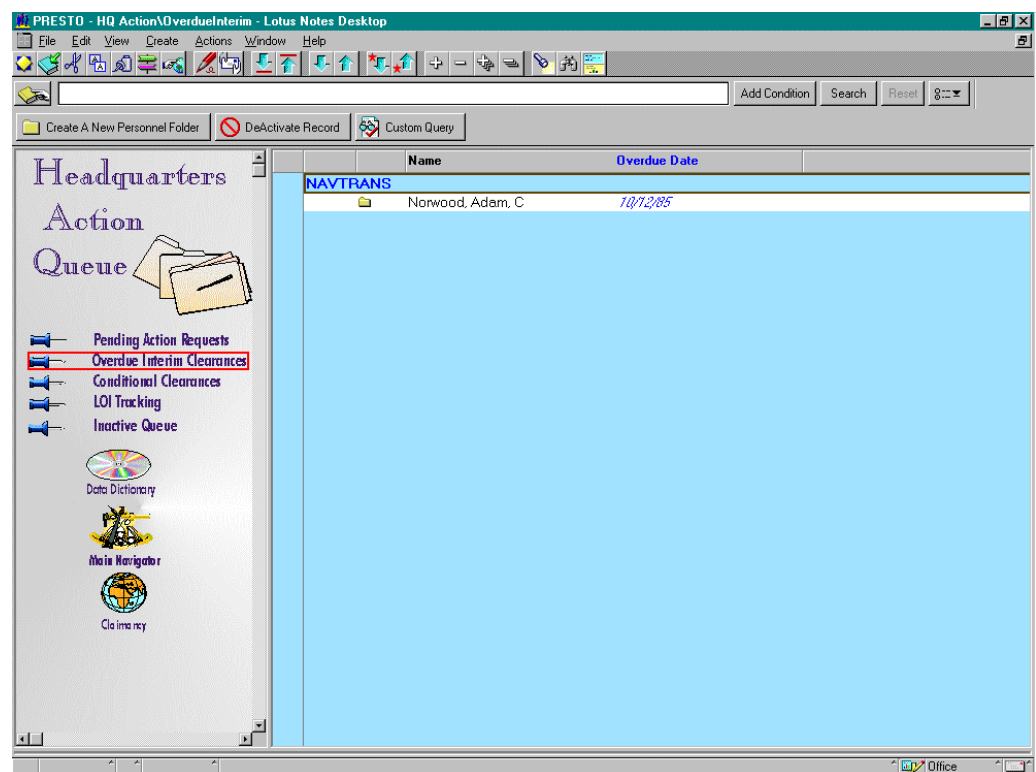
Figure 4.3 Overdue Interim Clearances View

Conditional Clearances

Headquarters may place conditional review and authorization periods on an individual's clearance. The Conditional Clearance review period (i.e., monthly, quarterly, semiannually, annually) allows an individual to work on classified material until subject for review. Headquarters will receive 10-day advance notice of expiring deadlines, so they can prepare and conduct a full review of the individual.

From the Headquarters Action Queue view, select the **Conditional Clearances** Navigator. A list of clearances with conditional dates display, as shown in Figure 4.4.
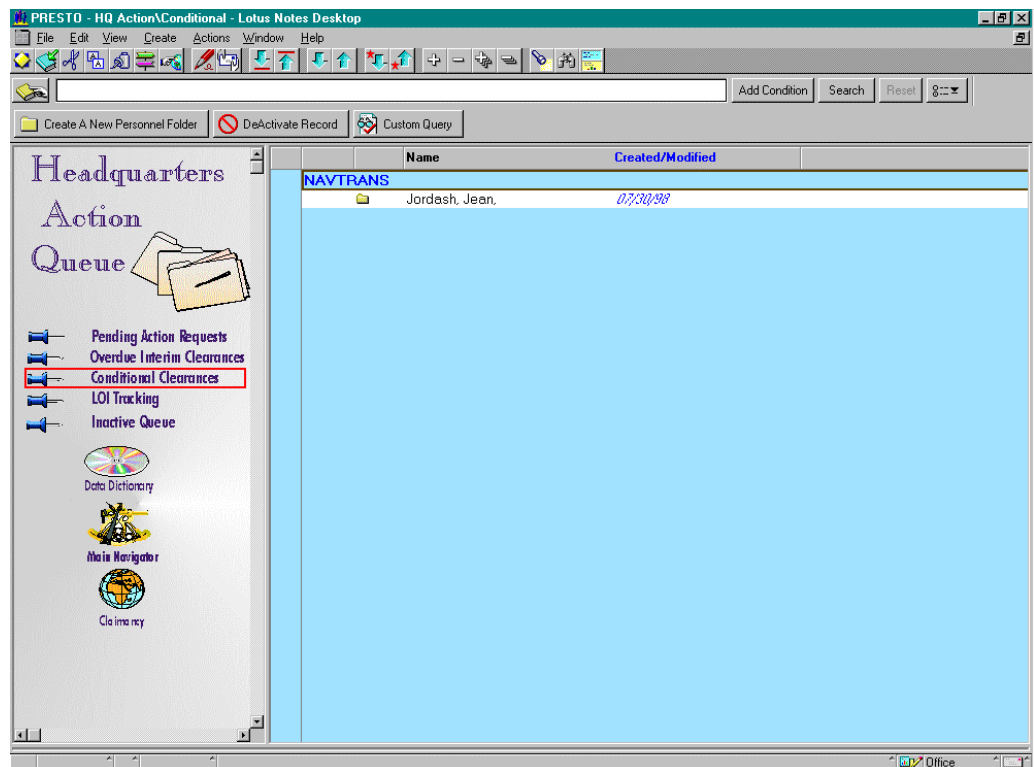
Figure 4.4 Conditional Clearances View

Letter of Intent (LOI) Tracking

PRESTO! tracks Letters of Intent from request to delivery. When an individual conducts his or herself in an unethical manner, Headquarters receives a request from DONCAF informing them that a LOI is required of the individual in question. Headquarters enters the date they receive the DONCAF request in the Master Security Record (MSR). Once the MSR is correctly stamped, Headquarters forwards the DONCAF request to the Parent Command Security Manager. Headquarters updates the MSR once again with the current action and date stamp.

Next, the Parent Command Security Manager hand carries the Request for a LOI to the individual. The Parent Command enters the date the MSR was delivered. Once the

Request is delivered to the individual, a 30-day clock starts in **PRESTO!**. The individual must now comply with the request and generate a written LOI within the next 30 days. If the individual defaults on the request within the 30 days, the LOI is considered outstanding and the renewal of the clearance will be denied. However, if the LOI is completed within the given timeframe, the **PRESTO!** clock trigger will not prompt for further action.

To track the activity of an LOI, select the **LOI Tracking** Navigator from the Headquarters Action Queue. A list of pending LOI records displays, as shown in Figure 4.5. The MSR Status field provides the current action taken (i.e., Headquarters – Initial Receipt, Delivered to Parent Command, Delivered to Employee, Response Completed) on the part of Headquarters.

Select the individual's record and open the record. Scroll to the Command Action section of the MSR. Indicate or ensure the **YES** option for the Letter of Intent was invoked. Next, indicate the applicable status of the LOI, and finally, correctly enters the Letter of Intent Date with the date applicable to the corresponding action. When all updates have been entered, select [**Save Changes/New Record**].
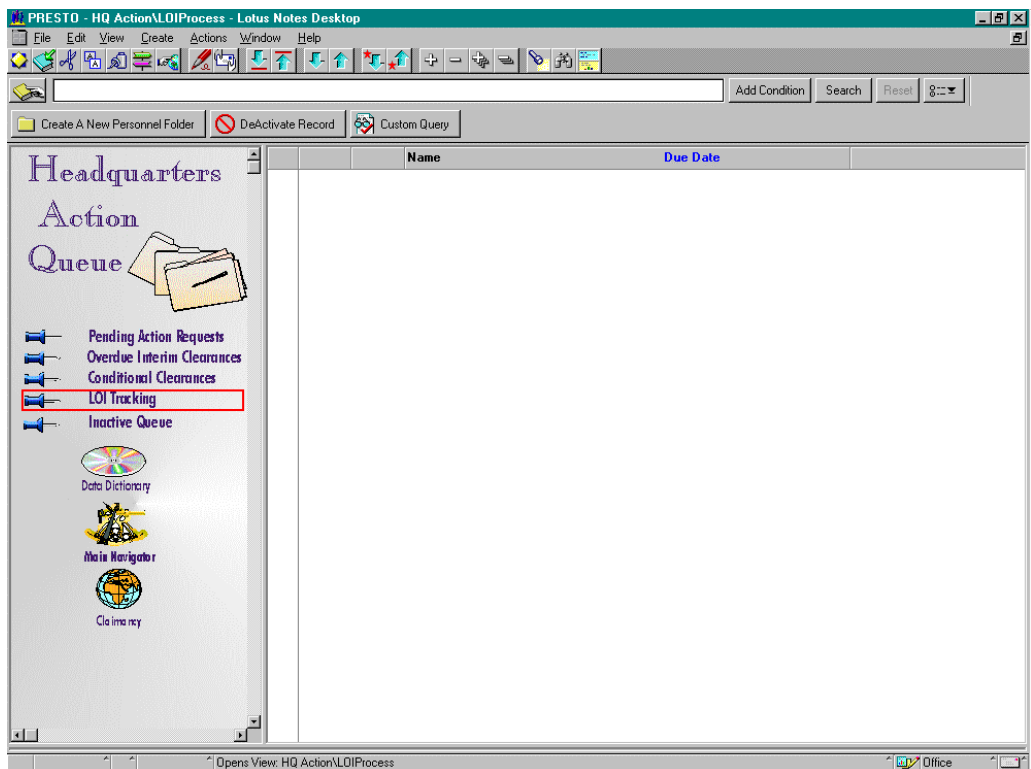
Figure 4.5 Letter of Intent View

Inactive Queue

Personnel records that have been flagged for deactivation will reside in the Inactive Queue.

Deactivating Personnel Records

Headquarters is responsible for formally archiving all personnel folders to the Archive Database. The formal archiving process is performed only after a Field Activity requests deactivation of a personnel folder. (See *Requesting Record Deactivation.*)

From the Headquarters Action Queue, select the **Inactive Queue** Navigator. A list of personnel folders required for deactivation displays. Double click the MSR to ensure this is the correct MSR for deactivation. Close the MSR. From the Inactive Queue, select [**Deactivate Record**]. The MSR and all it's folder contents are automatically moved to the Reference Library.

Chapter

5

The Archive Database

Personnel Security information is generated and maintained in paper form. NAVSUP Headquarters maintains paper folders for all Claimancy personnel. Field Activities call Headquarters personnel to obtain information from the personnel folder. Since these paper documents need to be more accessible and are often used for reference material, making them available online makes sense.

The World Wide Web (WWW) provides NAVSUP with a great opportunity to distribute and share *secure* Personnel Security information across the Claimancy. In support of the PRESTO! application, a PRESTO! Archive Database was developed. The PRESTO! Archive Database holds two types of information: the deactivated online PRESTO! folders and electronic copies of the historical paper file and PRESTO! generated records.

The paper Personnel Security records maintained by NAVSUP Headquarters were converted to Portable Document Format (PDF). (See *Adobe Acrobat Exchange V3.0//Reader V3.0.*) Deactivated PRESTO! Personnel Security records are posted automatically to the PRESTO! Archive.

To view Claimancy-wide Personnel Security folder information, launch your Internet Browser. Type the following address: http://www.quads.navsup.navy.mil. From this view, select [**Business Applications**]. Select **PRESTO!**. Select **Archive Database**. Enter your login and password.

The **PRESTO!** Archive

Headquarters is responsible for archiving all deactivated personnel folders to the PRESTO! Archive. The archiving process is performed only after a Field Activity requests deactivation on a PRESTO! folder. From the Inactive Queue, Headquarters personnel opens and reviews the record. After determining the record should be deactivated, select [**Deactivate Record**]. This record is now deactivated and resides in the Archive Database area referred to as the **PRESTO!** Archive.

The Reference Library

NAVSUP Headquarters converted all paper Personnel Security records and established the Reference Library. The Reference Library resides and is available on the WWW. There are two procedures for converting personnel security information for inclusion into the Reference Library. The first procedure converts hardcopy documents to PDF and adds the converted file to the appropriate Reference Library record. The second procedure converts **PRESTO!** generated documents to PDF and adds this information to the appropriate Reference Library PDF file attachment.

Scanning to PDF

Production scanning procedures are documented and reside with Headquarters personnel. For a copy of these procedures, please contact the NAVSUP Security Sponsor. For specific scanning procedures refer to Chapter 3, *Scanning to PDF*.

Posting PDF to the PRESTO! Archive Database

Only Headquarters personnel can create or modify an Archive Library record and Master PDF archive reference file. After the initial Record Reconciliation effort, Field Activity personnel will need to *Compose a Change Request* to submit updates or changes to an existing Archive Library PDF.

To post documents to the Archive Library, complete the following procedures:

- ❑ Open the **PRESTO!** Library icon located in the **Lotus Notes**® workspace.
- ❑ Click past the splash screen.
- ❑ Locate the person's name in the Reference Library listing. (Note: You can *always* search by name and SS#.)
- ❑ Open the person's library record, by double clicking on the person's name. The record window has the information as shown in Figure 5.1. You may have to scroll to locate the name.
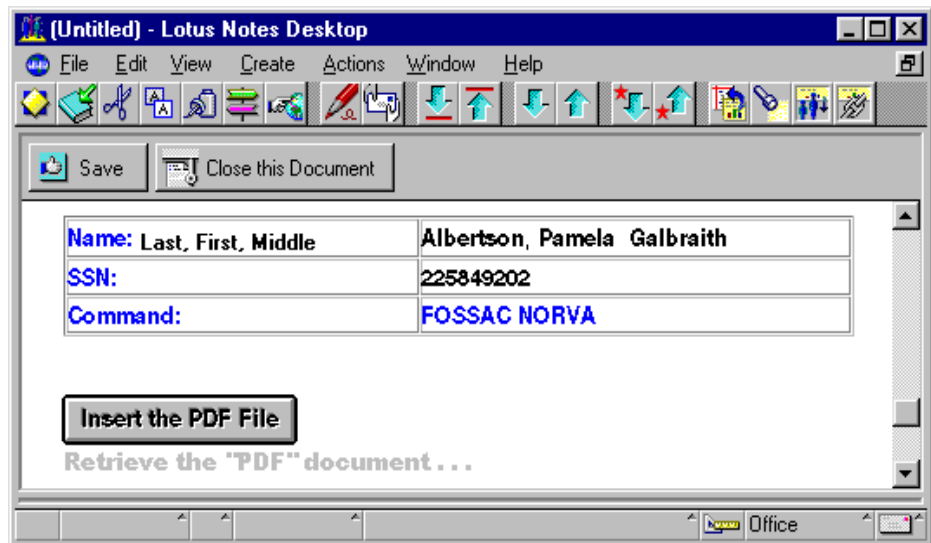
Figure 5.1 Lotus Notes® Desktop Window

❑ Select [**Insert the PDF File**]. A Create Attachment(s) window appears, similar to Figure 5.2.
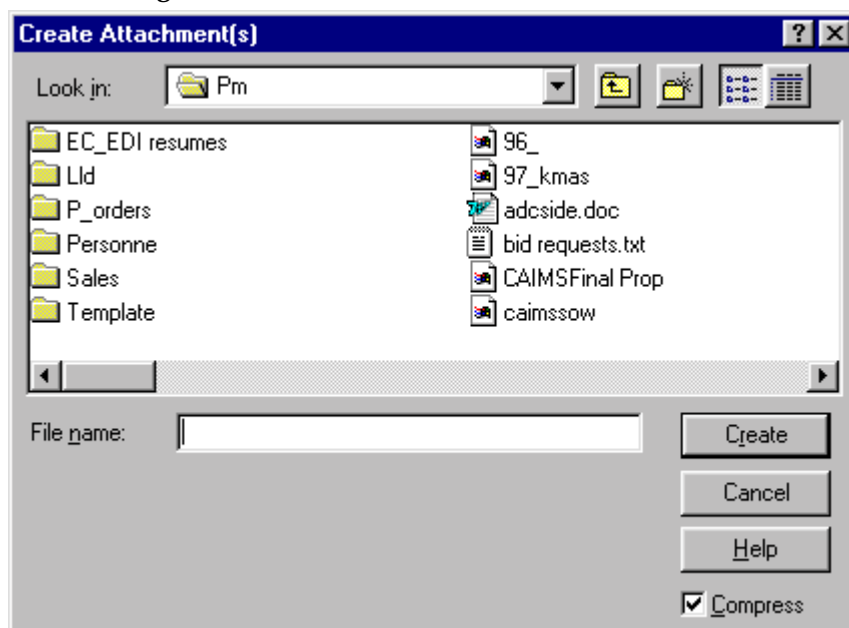
Figure 5.2 Create Attachment(s) Window

❑ Locate the PDF. (e.g. on the L: drive and in the appropriate FISC folder).

❑ Select the appropriate PDF (e.g., mt222000.pdf) and select [**Create**].

❑ Select [**Close Document**] to return to the Library record listing.

Procedures for Printing PRESTO! Documents to PDF

PRESTO! users can also produce PDFs for documents maintained and generated in **PRESTO!**. These documents can be printed to PDF and added to the appropriate Reference Library record. Open any MSR, 413, or other PRESTO! document and select [**Print**]. Instead of using the default printer selection, select **Acrobat PDF Writer on Disk** from the Printer Selection listing. Verify the Printer parameters (e.g., pages) are correct and select [**OK**]. Identify the appropriate storage area (e.g., drive, directory), type in a name for the file and select [**OK**]. The output will be sent to a PDF file that can be reviewed in Adobe's Acrobat Reader or Acrobat Exchange.

Appendix

A

Features of Lotus Notes

The user interface for **PRESTO!** is a Lotus Notes   (Release 4.0 or higher) desktop that incorporates the document functionality that you will need in the **PRESTO!** database.

Lotus Notes   Workspace

The Lotus Notes   workspace, shown in Figure A.1, is the window Notes displays when you open Lotus Notes . The workspace consists of the menu bar, several tabs with various database icons on each tab, the status bar, and the SmartIcon toolbar. You can organize sets of related database icons on different tabbed pages in the workspace, and give each page a descriptive name. The last page is automatically occupied by the Replicator, which allows you to manage replication activities. You cannot rename the Replicator page.
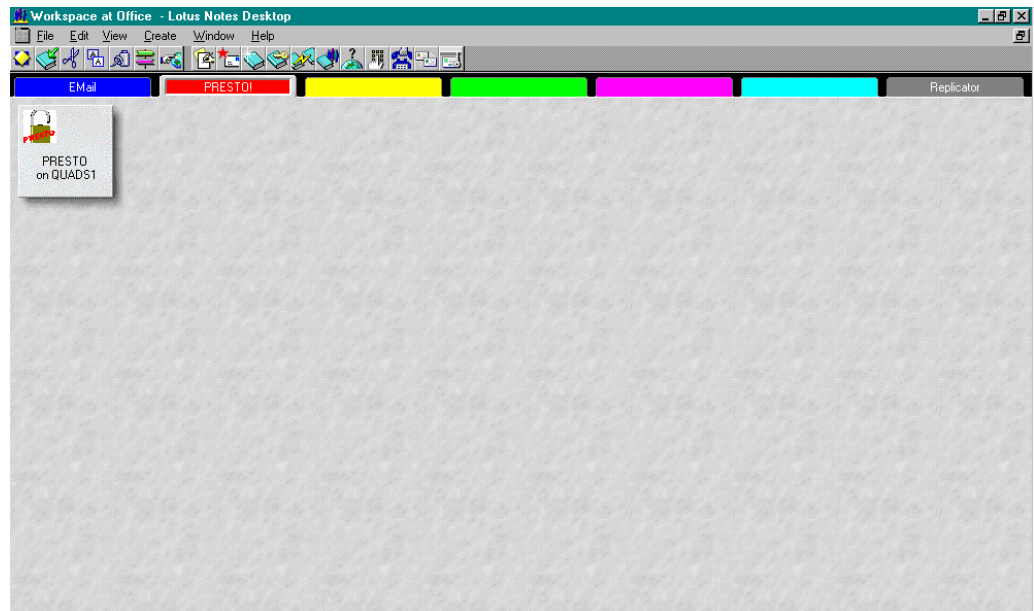
Figure A.1 Lotus Notes   Workspace

SmartIcons

While working in Lotus Notes , you have access to the standard Lotus Notes Universal SmartIcon set. These are buttons at the top of the Lotus Notes workspace that, when pressed, will execute common file menu commands. For many tasks, it is simpler to click SmartIcons than to pull down menus or recall and type keyboard shortcuts. The SmartIcons are "context - sensitive," meaning they change according to where you are in the database to allow for the common functionality most often required in that part of the database. An illustration is at Figure A.2, followed by a description of each SmartIcon.

> Note:
>
> When you hold the mouse pointer over the SmartIcons, Lotus Notes displays a brief description of the icon. You can hide or display these descriptions by choosing **File | Tools | SmartIcons** from the menu bar. In the resulting dialog box under Show, select or deselect Descriptions. Click [**OK**].

Figure A.2 Lotus Notes   Universal SmartIcon Set

 Properties. Displays the properties such as file size, indices of documents or databases.

 File Save. Saves the current object.

 Cut, **Copy, and** **Paste.** "Cut" removes the currently selected text/object and places it on the clipboard. "Copy" copies the currently selected text/object and places it on the clipboard. "Paste" copies the text/object from the clipboard to the current cursor position or over the currently selected text/object.

 Help Guide Me. Calls up the Help section of Lotus Notes .

 Actions Edit Document. Places the currently selected document in "Edit Mode."

Actions Forward. Forwards a mail memo.

Navigate Next Main. Will navigate to the next document at the highest level of the document hierarchy.

Navigate Previous Main. Will navigate to the previous document at the highest level of the document hierarchy.

Navigate Next Document. Will navigate to the next sequential document.

Navigate Previous Document. Will navigate to the previous sequential document.

Navigate Next Unread. Will select and navigate to the next unread (not previously viewed) document.

Navigate Previous Unread. Will select and navigate to the previous sequential unread (not previously viewed) document.

View Expand. In outline view, will expand the subordinate documents for the selected document.

View Expand All. In outline view, will expand all subordinate documents in the view regardless of selection of any particular documents.

View Collapse. In outline view, will remove view of subordinate documents and show only the superior document with a "twistie," indicating that subordinate documents are available.

View Collapse All. In outline view, will distill the view to the top level only with "twisties" to indicate subordinate documents are available.

Edit Find/Replace. Allows the classic text search with replacement of the designated text.

View Show/Hide Search Bar. Toggles from the outline view with the search bar to the outline view without the search bar (For the search bar to be useful, the database must be full text indexed).

View Show/Hide Preview Pane. Toggles from the outline view with a selected document "tiled" to the outline view without the selected document "tiled".